State of California—Health and Human Services Agency

Department of Health Services

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December 6, 2006

TO: ALL COUNTY WELFARE DIRECTORS   Letter No.: 06-38
                ALL COUNTY WELFARE ADMINISTRATIVE OFFICERS
                ALL COUNTY MEDI-CAL PROGRAM SPECIALISTS/LIAISONS
                ALL COUNTY HEALTH EXECUTIVES
                ALL COUNTY MENTAL HEALTH DIRECTORS
                ALL COUNTY MEDS LIAISONS

SUBJECT: BUSINESS OBJECTS WEBSITE APPLICATION – MEDS ALERTS
              REPORTING SYSTEM

PURPOSE

The purpose of this letter is to provide background and information about a new application on the California Department of Health Services' (CDHS) Business Objects website. This new application, the MEDS Alerts Reporting System (MARS), provides counties with access to summary and detail reports and tracking of critical and priority MEDS alerts. The MARS is available through a link to Business Objects on the Medi-Cal Eligibility Data System Home Website (MEDS Home Page).

BACKGROUND

Per All County Welfare Directors Letter (ACWDL) 05-19, counties are required to process certain MEDS alerts within specific timeframes identified in that letter. ACWDL 05-19 also states that CDHS will post county alerts and exception eligibles reports on

Business Objects, along with instructions on how to access the data. This ACWDL provides the information necessary to access the Business Objects application discussed in ACWDL 05-19.

OVERVIEW

The objective of the MARS application is to provide a tool for counties to monitor and track their critical and priority MEDS alerts. This new application will assist counties in following up on MEDS and Reconciliation alerts within required time frames. The MARS provides:

1. Summary reports that enable the counties to identify the distribution of their MEDS alerts on a weekly and monthly basis. These counts of alerts are arranged by the following categories,

    - "Statewide by Consortium",
    - "Consortium by Organization",
    - "Organization by District", and
    - "Organization by District and Worker." ("Organization" represents counties and other non-County organizations who receive MEDS alerts).

2. Detailed reports that allow counties to identify selected alert data on a daily basis by:

    - "Organization",
    - "Organization and District", and
    - "Organization and District and Worker."

Both Summary and Detailed reports can contain the following data:

- Alert source, Alert type and Alert number,
- Exception eligibles,
- Transaction code,
- Aid code,
- Report type,
- Burman eligibles.

MARS includes all of the alerts designated as critical or priority alerts in ACWDL 05-19. The critical and priority reconciliation alerts are included in the daily alert reports by alert type, alert number, or alert source on the day that the reconciliation is processed. The

critical and priority exception eligibility alerts are included in the daily alert reports by alert type, alert number, or alert source on the day that MEDS Renewal is run. These daily reports are retained for ten days.

MARS has changed significantly from what was demonstrated during the county MEDS training sessions in the fall of 2005. That prototype required users to select their own criteria for generating reports. This model was flexible but generated its results slowly. To improve performance, the reports are now built by CDHS. MARS now provides a wide range of prepared reports, tailored for each county or SAWS consortia. Access times are better, although not instantaneous. Users still need to wait a few moments, particularly for the larger reports.

If users resubmit a request too soon, it may "lock up" their web browser or display an empty screen. Also, the list of available reports may be missing upon the initial login to MARS or may not reappear after exiting a report. To resolve these issues, try the following:

- Click on the refresh button in Business Objects (this is an icon of two arrows circling each other that is located on the right hand side), or
- Click on the link for "MEDS Alerts", or
- Click on the Home button at the top of Business Objects, or
- Log out of Business Objects using the icon located in the upper right hand corner and then log back in.

MARS System Requirements

The minimum work station requirements for accessing the MARS application include:

- Operating System: Windows NT 4.0 SP6a, Windows 2000 SP3 or better, Windows XP SP1 or better.
- Web browser: Internet Explorer 5.5 SP2 or higher; Netscape, 7.0.2 or higher; Mozilla Firefox,1.5 or higher;
- Java and Javascript enabled in your web browser (Sun Java Runtime Environment 1.4.2 or higher is recommended).
- Cookies enabled in your web browser.
- Reports are best viewed using Adobe Acrobat Reader within your web browser. The benefits include easier navigation of the reports using the bookmark tree on the left-

- hand side of Acrobat reader. Additionally, users can save reports locally by clicking on the disk icon in the upper left corner of the Acrobat reader toolbar, selecting a local hard drive directory to save the file to, and entering a file name of their choosing.

To use Acrobat reader:

- Adobe Acrobat Reader should be installed and enabled in the web browser
- Change the following setting within Business Objects: Within the "View" tab on Business Objects' Options menu, scroll down and select the "PDF in Infoview" option for Business Objects documents.

MARS IMPLEMENTATION

The MARS application is now available to counties through a link to Business Objects on the MEDS Home Page website. Thus, users of MARS and other Business Objects tools must have a CDHS extranet user I.D. and password to access the MEDS Home Page, and then access Business Objects. Within Business Objects, look for the "MEDS Alerts" link. There is a MARS users' guide in that folder and additional system documentation in the "Reference" sub-folder.

During July 2006, each MEDS county coordinator was given access to MARS with the same User ID and password that they currently use for other Business Objects tools, such as the reconciliation reports and the online statistical reports. Beginning Monday, August 7, 2006, the MEDS Coordinators were able to add users for their organization. The form to request access for other county staff was sent to the e-mail address designated for each MEDS coordinator (this address starts with the two-digit county number followed by the letters "CRDNT"). The form is also available under the Forms section on the MEDS Home Page Website.

Existing Business Objects users do not automatically receive access to MARS. Requests for access must come from the MEDS Coordinator or the MEDS Security Coordinator e-mail address designated for the county and must be sent to the ITSD Help Desk, ITSDHELP@DHS.CA.GOV. Requests from staff, other than the MEDS Coordinator or the MEDS Security Coordinator, will be returned.

Although there is not a limit, at this time, as to the number of staff allowed access in each county, CDHS asks that counties only provide access to staff who will use the application on a regular basis.

- MARS is intended for eligibility supervisors, managers, and other staff who manage MEDS alerts. It is not intended for use by all eligibility workers since they would see

> alerts for the entire county or consortia. Workers do not see just their own alerts on the MARS system.

- It is CDHS policy that if the user has not accessed any Business Objects application at least once every 90 days, then the User ID will become inactive and another request must be submitted to restore access for that user.

Users from non-County organizations such as CDHS, Healthy Families, and SAWS consortium system staff may request access by contacting Ken Louie, Medi-Cal Eligibility Branch at (916) 552 – 9515, KLouie1@DHS.ca.gov.

User guides and documentation on the types of reports that are available, how to request reports, and how to print or save reports, is available on the MARS Business Objects website in the "MEDS Alerts" and "Reference" folders.

Ad Hoc Dynamic Reporting Feature of MARS

Counties may also use the Ad Hoc features of MARS to produce custom reports. In order to use these features, staff must attend a one-day Business Objects training session at CDHS. This training includes: high-level discussion on Business Intelligence, Business Objects and WebIntelligence, accessing Business Objects – including an overview of the Business Objects Home Page, building simple reports, review of report customization features, and creating Business Objects charts and graphs. Please contact Ken Louie via e-mail at klouie1@DHS.ca.gov or (916) 552-9515, for information about upcoming classes.

Business Objects is designed as a reporting and analysis tool, not a data extraction tool. This means that the ad hoc MARS application is subject to Business Objects website limits on the number of alert records returned per request. When a request is made that results in a number of records returned that exceeds 50,000, the request may time out and/or the user will receive a "Partial Data Returned" message (Note that the number of records is not the same as the number of Medi-Cal cases in a county).

If a county has ad hoc reporting or data extraction needs that are outside of the existing website limits, there are several other options available.

- The user can narrow the scope of their request by asking for fewer days' worth of data, a smaller date range, fewer types of alert data, and/or data for a smaller number of workers. Example: For a county with a large Medi-Cal population, a single request covering an entire month's worth of data could exceeds the record limitation. In this case, they will need to request no more than a week to ten days' worth of data in a single request. For a county with a smaller Medi-Cal population, an entire month's worth of data could be well within this limitation.

- The county may choose to receive their alert data in an electronic format directly from CDHS. This option allows the county to import their data into spreadsheet, database, or other county software for their own sorting, selection, and manipulation. Some counties are already using this option. For additional information, please contact the ITSD Help Desk, (916) 440 - 7000, (800) 579 - 0874, ITSDHELP@DHS.CA.GOV

FUTURE ENHANCEMENTS

Future enhancements to MARS may include:

- Detail and summary reports by transaction source (batch, online, and MEDS).
- Statewide by County summary reports.
- Reports by the secondary alert category defined in ACWDL 05-19.
- Other additional summary and detail reports.

If you have any questions regarding access to the Business Objects MARS website, including password resets, please contact the DBA Support Unit in CDHS through the ITSD Help Desk, (916) 440-7000, (800) 579-0874, ITSDHELP@DHS.CA.GOV. In your request, please specify that the issue is with the "Business Objects MARS application."

If you have any questions regarding the requirements of ACWDL 05-19, please contact Ken Louie, Medi-Cal Eligibility Branch, (916) 552 – 9515, KLouie1@DHS.ca.gov.

Original signed by

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